

Retirement Reporting Reminders

Payments:

- Send DRS completed Payment Advice Forms with all non-electronic payments
- Send DRS completed Plan 3 Payment Advice Forms with all non-electronic Plan 3 payments
- Do a Credit Redistribution (via paper form or phone) when resubmitting rejected information for any prior Reporting Period

Reporting:

- Report compensation, employer contributions, non-Plan 3 member contributions and hours in the months earned
- Plan 3 member contributions are reported as paid
- Report comp-time cash out amounts in the months earned
- Lump sum payments of unused leave should be reported with correct status code and only for Plan 1 members of PERS, TRS and WSP
- Retroactive payments need to be reported in the months earned but can be reported as a lump sum with Status Code M
- All retirees must be reported to DRS with the appropriate Type Code
- When you hire a Plan 3 member, do not report member contributions to DRS until the member provides you with a completed Member Information Form (MIF)
- For PERS employers, new members have up to 90 days to choose Plan 2 or Plan 3 – report the member in Plan 2 until the member provides you with a completed MIF
- For SERS employers, new employees who have established membership in PERS Plan 2 must be reported in SERS Plan 2 – these members have the option of transferring into SERS Plan 3 each January

Eligibility:

- Review position eligibility status at least annually
- Elected officials have the option of joining PERS, WAC 415-108-550
- Retirement Status Form or some type of written documentation must be used to document if an employee is a retiree from one of the Washington State Retirement Systems